



STATE OF TENNESSEE
DEPARTMENT OF GENERAL SERVICES

STEVEN G. CATES
COMMISSIONER

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GOVERNOR

Requisitions

Creating New Requisitions

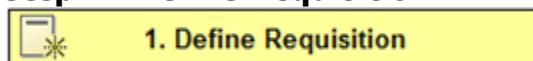
Agency Level- Requester

Introduction: Requisitions are created by Agency Requesters in Edison using the eProcurement section. They are used as the starting point for requesting purchases from both internal Agency Buyers and Central Procurement Office Personnel.

- **Agency Buyers:** Requisitions for purchases from \$5,000-\$25,000 and Contract Release requests are both routed to Agency Buyers. Agency Buyers eventually create Purchase Orders from these requests. They can also create POs for purchases under \$5,000.
- **Central Procurement Office Personnel:** Requisitions for Agency Term Contracts and One-time Purchases over \$25,000 are both routed to the Central Procurement Office (CPO). These are bid out to Vendors and eventually become either a Purchase Order or Agency Contract.

Process: *How to Create a Requisition*

Step 1: Define Requisition



- 1) To create a Requisition, you must first be logged in to Edison. After logging in, click the FSCM link under the Enterprise menu, on the left side of the page.



CENTRAL PROCUREMENT OFFICE

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- 2) The next step is to navigate to the **Create Requisition** page. Click on **eProcurement** from the left-hand menu. Then click **Create Requisition**, as shown in the picture below this paragraph, on the left. This can also be accessed by using the eProcurement link in the Main Menu at the center of the page. A picture of this is on the right.






- 3) Clicking on Create Requisition will bring up a new page, with a title saying **Create Requisition** in blue at the top. This is the main page for creating a Requisition, and has links that will go to the various sections that need to be completed. The sections are grouped under three main tabs, numbered in a strip at the top, below the title. The tab that is currently shown will be highlighted in yellow. See the picture below for an example. **Note:** In training, Buyer Defaults will not be set up, so you will have to enter the Business Unit.

A screenshot of the 'Create Requisition' page. The page has a title 'Create Requisition' in blue. Below the title, there are three tabs: '1. Define Requisition' (highlighted in yellow), '2. Add Items and Services', and '3. Review and Submit'. Below the tabs, there is a text box for 'Specify requisition name, requester, and other information that applies to the entire requisition.' Below this, there are several fields: 'Business Unit' (32101), 'General Services', '*Requester' (TN2_PU_EPRO_AGENCY_REQUESTOR), 'TN2_PU_EPRO_AGENCY_REQUESTOR', 'Currency' (USD), 'Requisition Name' (empty), 'Doc Type' (empty), and 'Priority' (Medium). There is a 'Continue' button at the bottom left.

- 4) To create a Requisition, the Requester must first define the Requisition. The Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure that your Business Unit and Requester defaulted in correctly. Now you must assign a Requisition Name.
- Requisition Name** Click in the **Requisition Name** field and then type in the name. Name the Requisition after the items being requested. Note: requests that are routed to the CPO require additional information.
 - For requests that will be completed by Agency Buyers, simply name the Items being requested.** This includes purchases from 5,000-25,000 and Contract Release orders.
 - For requests that will be completed by the CPO, the Requisition Name must start with “DGS”.** This includes Requests for Agency Contracts and One-time Purchases over \$25,000. This is an identifier for the CPO. Example: “DGS Tiller, Rotary”.

Create Requisition

 1. Define Requisition	 2. Add Items and Services	 3. Review and Submit
--	--	---

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: General Services

*Requester: Robert J Hamblin


*Currency:

Requisition Name: Doc Type: Priority:

Line Defaults




- 5) After naming your Requisition, click the Continue Button () located at the bottom to move to the next step in the Requisition Process.

Step 2: Add Items and Services

 2. Add Items and Services
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- 1) The next step is to add items to the requisition. Items can be pulled from the catalog, loaded from a saved Template created from a previous Requisition, or entered manually. **Agencies are required to first make sure the items are not available from an active contract.**
- 2) The main **Add Items and Services** page has 7 tabs at the top. Each of these tabs contains a different way to create Item Lines on a Requisition. The purchase type and Doc Type you've chosen determine the Item Selection tabs you will use to create your Requisition. A picture of the main Add Items and Services page is shown below.

Create Requisition

 1. Define Requisition	 2. Add Items and Services	 3. Review and Submit
--	--	--

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Services Forms Web Special Request

- 3) From left to right, the tabs are as follows:
 - **Catalog-** This allows you to search the Catalog for the items listed in the Item Master. The Catalog tab will mainly be used in setting up Contract Release orders. **Every item that can have a fixed price and is on a currently active Statewide or Agency Term contract will be in the Item Master.** This means that Contracts for **hourly services, APCAT items and variable cost items ("parts plus")** will *not* be usable from the catalog. Every item in the Item Master is not necessarily on a contract. Commonly-ordered items will not be on contract, but may be in the Item Master.


- **Favorites-** The Favorites tab consists of Item Lines you have saved to your personal Favorites list. The method to do this will be detailed later in the document. This will have no information in it at Go-Live. This is a method to save Line Items you order frequently and reuse them in new Requisitions without having to enter them again. This tab is convenient, but is never required in any type of purchase.
 - **Templates-** The Templates tab, like the Favorites tab, will have no information in it at Go-Live. It allows you to save sets of line items for future use. An example would be a “New Employee set” consisting of pens, a stapler and sticky notes. Three line items that can be saved as one Template, to be used any time the specific item listings need to be re-ordered. Like Favorites, this tab will never be required, but can be useful.
 - **Services-** The Services tab will not be used at the current time.
 - **Forms-** The Forms tab will not be used at the current time.
 - **Web-** The Web tab is used to link to the websites of specially-selected Direct-Connect vendors. Direct-Connect vendors are contract-holding vendors that have set up a special version of their website for use by the State of Tennessee. The links here will take you to external websites to browse for items, and will pull the items back into your Edison requisition after you are finished shopping. Items on the web tab will be on Contract.
 - **Special Request-** The Special Request tab can be thought of as a kind of “catch-all” tab. It allows you to type descriptions for items that are not in the Item Master. This will be used in requests for new Agency contracts and any requests for items over \$5,000.01 that are not on contract. This tab can also be used to order contract items that are selected on the “As Per Catalog” (APCAT) principle. The Special Request tab **must** be used when buying anything on contract that does not have a fixed price, such as hourly rates and “parts plus” item lines on contracts.
- 4) The tab you use will be determined by the type of purchase Request you are creating. We will start with using the Catalog tab to do a Contract Release Order, and then list the other tabs in order.

Catalog Tab and Contract Release Orders

To search for items:

- First, click on the Catalog tab under the Search bar. In the example below, the catalog tab is highlighted.

Create Requisition



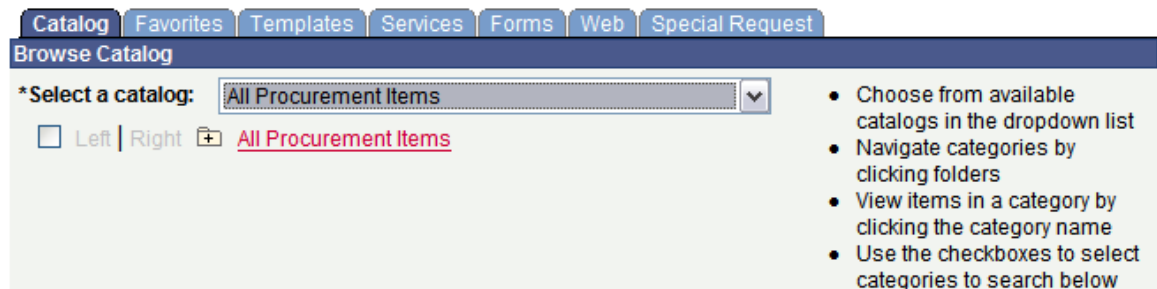
1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Services](#) [Forms](#) [Web](#) [Special Request](#)

- Next, make sure the **All Procurement Items** catalog is selected from the drop-down menu, as shown on the next page. This should show as the default option when the Catalog tab is selected.



[Catalog](#) [Favorites](#) [Templates](#) [Services](#) [Forms](#) [Web](#) [Special Request](#)

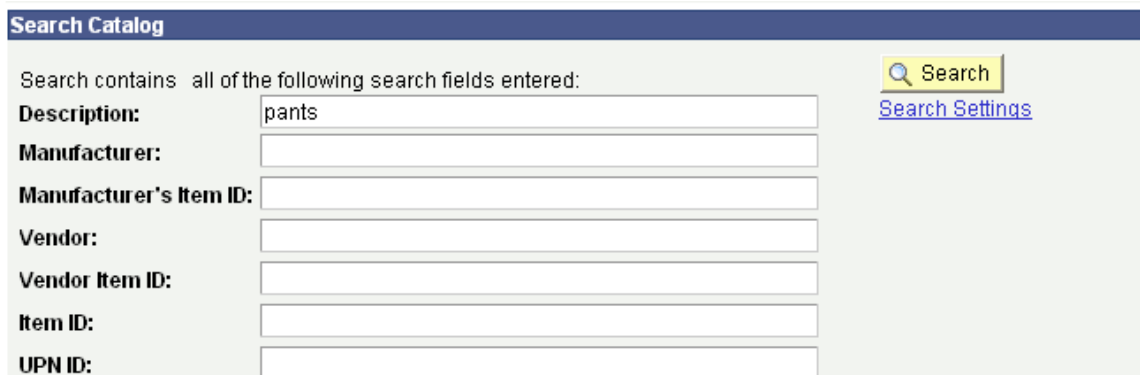
Browse Catalog

*Select a catalog:

☐ Left ☐ Right [All Procurement Items](#)

- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

- Underneath the catalog listing is the **Search Catalog** section. This contains fields to search by different listings. For example, a description of the item can be typed in the Description field, such as “pants” to search for all items with “pants” in the description. After typing the Search Term in the Search field, press the Search button. An example is shown below.



Search Catalog

Search contains all of the following search fields entered:

Description:

Manufacturer:

Manufacturer's Item ID:


Vendor:

Vendor Item ID:


Item ID:

UPN ID:

[Search Settings](#)


- If any items meet the search criteria used, they will be displayed below the **Search Catalog** section. The results appear in a table format, with named headers at the tops of the columns. There are more column headers than the screen can display, so you can scroll to the right or press the Show All Columns () button to view the rest of the headers.

- Special Notes: The Vendor column lists the last vendor the item has been bought from. If there is a contract for that item, the number will appear in the Contract ID field. The Price field will show the fixed contract price if there is a contract. If there is no contract, it will default at the item's last purchase price.

Details										
	Quantity		Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY	Contract ID	Vendor
<input type="checkbox"/>	1.0000		1000049386	331533 - Urban Highschool Conference Participants Guide		0.010				
<input type="checkbox"/>	1.0000		1000050649	343695 - Training Participants Manual-Healthy Families America		0.010				
<input type="checkbox"/>	1.0000		1000050852	344002 - Sensitivity / Ethics Training - Participants Guide		0.010				

- If the item you need was located by the search (meaning it is on an active contract), check the box next to the item to include the item on the Requisition. Then type the Quantity in the Quantity field. An example is shown below with a Quantity of 1.0000.

	Quantity		Item ID
<input checked="" type="checkbox"/>	1.0000		1000049386

- After inputting the desired quantity, click the Add () button. Once added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.

Requisition Summary		
Description	Qty	UOM
331533 - Urban Highschool ...	1	EA
Total Lines:	1	
Total Amount (USD):	0.01	

- 5) After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.



Web Tab and Contract Release Orders

- 1) If the item is not found in the Catalog tab, click the Web tab to search the Direct-Connect contracts. Within the web tab, there will be links to contract Vendor (Grainger, VWR Scientific, and AP&T) websites that have been customized for the State. An example is shown below. Scroll to the far right and click the links.

Catalog	Favorites	Templates	Services	Forms	Web	Special Request
Logo	Merchant		Description			
	Grainger Direct Connect		SWC#235 INDUSTRIAL/COMMERCIAL SUPPLIES			
	VWR Direct Connect		SWC # 563 Laboratory Supplies			
	APT Direct Connect					

[Review and Submit](#)

Grainger Direct Connect	SWC#235 INDUSTRIAL/COMMERCIAL SUPPLIES
VWR Direct Connect	SWC # 563 Laboratory Supplies
APT Direct Connect	

Directions are specific to each company's website. After finding the item, it will be added to the requisition. From there, the process is the same as a Contract Release done from the Catalog tab.

- 2) After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.



Special Request Tab and APCAT Contract Release Orders (Also used for "Parts Plus", "Time and Labor" and "Variable Cost")

- 1) **APCAT Contracts:** If you are ordering from a contract that lists a line as "As Per Catalog" (APCAT), you will need to obtain all the needed item information from the vendor or vendor catalog, similar to the current process in TOPS. Examples of


- 2) needed information are Vendor Item Number, Item Description, Unit of Measure and Unit Price (Catalog price less contract discount). Once this information is obtained, the item will be entered as a Special Request.
- 3) Note for APCAT Contracts: The Content Team will be reviewing items ordered, looking for commonly ordered items off of APCAT lines. Any item that is ordered often enough will be added as an item line, and will be in the catalog, like a normal Contract Release. Contact content.management@state.tn.us if you have any further questions about this process.
- 4) To enter a Special Request for APCAT, click the “Special Request” tab, highlighted in the example below. Then click the **Special Item** ([Special Item](#)) link.

The screenshot shows the 'Special Item' form with the following fields and controls:

- Tabbed interface: Catalog, Favorites, Templates, Forms, Web, **Special Request**
- Form title: **Special Item**
- Fields:
 - *Item Description: [Text input]
 - *Price: [Text input]
 - *Quantity: [Text input]
 - *Category: [Text input with search icon]
 - Vendor ID: [Text input with search icon]
 - Vendor Item ID: [Text input]
 - Mfg ID: [Text input with search icon]
 - Mfg Item ID: [Text input]
 - *Currency: [Text input, value: USD]
 - *Unit of Measure: [Text input with search icon]
 - Due Date: [Text input with calendar icon]
- Link: [Suggest New Vendor](#)
- Section: **Additional Information**
 - [Large text area]
 - [Print icon]
- Checkboxes:
 - ☐ Send to Vendor
 - ☐ Show at Receipt
 - ☐ Show at Voucher
- Buttons: **Add Item**, **Cancel**, **Add or Start New Type**

- 5) The Special Request tab has several fields where information must be entered. The bulleted listed below lists these fields.

All the fields marked with an asterisk (*) must be completed.

- a) **Item Description:** This is used to enter a detailed description of the item. Good descriptions begin with a noun and then have descriptive terms. Such as “Pants, insulated, blue, 34 waist, 32 length”.
- b) **Price:** This is the estimated price for the item.
- c) **Quantity:** This is the quantity needed.
- d) **Unit of Measure:** This is used to select a Unit of Measure. Press the Lookup Button () to pull up a list of valid Unit of Measures. Select the appropriate Unit of Measure from the list.

- e) **Category:** This is the National Institute of Government Purchasing (NIGP) code category. NIGP codes are the standard being used for Edison, replacing the old Tennessee Commodity Code (TCC) system. Press the Lookup Button (🔍) to pull up the NIGP search screen, shown below.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By:

Categories			
Customize Find View All First 1-42 of 42 Last			
Catalog	Category	Description	Find in Tree
1 PURCHASING ITEMS	240-96	Timers, Mechanical	
2 PURCHASING ITEMS	240-96	Timers, Mechanical	

- f) Type a description in the Description field and press the Find button. This will display a list of valid NIGP codes. Select the appropriate code from the list by clicking the link in the Category column. This will return you to the Special Item screen.
- g) For APCAT Contract releases, there are three additional things that you must enter. These are the Vendor ID, Vendor Item ID and, if available, the contract number. See the picture on the next page for examples on where to enter this information. The Vendor ID can be found through searching the Catalog tab, while the Vendor Item ID will be obtained from contacting the Vendor directly.

Catalog Favorites Templates Services Forms Web **Special Request**

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure: 🔍

*Category: 🔍 Due Date: 📅

Vendor ID: 🔍 American Paper And Twine [Suggest New Vendor](#)

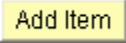
Vendor Item ID:

Mfg ID: 🔍

Mfg Item ID:

Additional Information

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

- h) After entering in all the required fields (listed above), press the Add Item button ().When added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown on the next page.

Requisition Summary		
Description	Qty	UOM
Widget	6	EA
Total Lines:		1
Total Amount (USD):		3,000.00

- 6) After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.



Special Request Tab for Requesting New Contracts

(Requests to create ATCs/ATMs)

- 1) Special Requests for requesting a new Agency Contract are done the same way as requests for APCAT items, with two important differences.
- The Vendor ID, Vendor Item ID and Contract ID are not required.
 - When requesting a contract, you must note in the Additional Comments field or the Description that you are requesting a contract. **Requests for new Agency Term Contracts must** have their Requisition Items assigned an Edison Item ID by the Content Group before the contract can be created. Please send an e-mail to Content.group@state.tn.us for further information.

Catalog Favorites Templates Forms Web **Special Request**

Special Item

*Item Description:

*Price:

*Quantity:

*Category:

Vendor ID:

Vendor Item ID:

Mfg ID:

Mfg Item ID:

*Currency:

*Unit of Measure:

Due Date:

[Suggest New Vendor](#)

Additional Information

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

2) The Special Request tab has several fields where information must be entered. The bulleted listed below lists these fields. As in an APCAT order, **All the fields marked with an asterisk (*) must be completed.**

- a) After entering in all the required fields (fields with an asterisk), press the Add Item button ().When added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.

Requisition Summary		
Description	Qty	UOM
Widget	6	EA
Total Lines:		1
Total Amount (USD):		3,000.00

3) After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Special Request Tab for Local Purchases **(Non-Contract Items under \$5,000 and from \$5,000.01-\$25,000)**

- 1) Requests for all items not on contract and under \$25,000 are done under “Local Purchase Authority”. Local Requests from \$5,000.01-\$25,000 are done as Special Requests, which then are bid out by Agency Buyers, the bids recorded in Sourcing and the Award made.
- 2) Local Purchases under \$5000 in Edison can be done as Special Requests as well. The only difference between this type of Local Purchase and the \$5,000-\$25,000 range is that Local Purchases from \$5,000-\$25,000 require Bids, while Purchases under \$5,000 do not.



- 3) Both are done as Special Requests through eProcurement. This ensures that all the proper Approvals are attached. To enter a Special Request for Local Purchase in either dollar amount category, click the “Special Request” tab, highlighted in the example below. Then click the **Special Item** ([Special Item](#)) link.

The screenshot shows the 'Special Item' form within the 'Special Request' tab. The form includes the following fields and controls:

- *Item Description:** A large text input field.
- *Price:** A numeric input field.
- *Quantity:** A numeric input field.
- *Category:** A dropdown menu with a lookup icon.
- Vendor ID:** A text input field with a lookup icon.
- Vendor Item ID:** A text input field.
- Mfg ID:** A text input field with a lookup icon.
- Mfg Item ID:** A text input field.
- *Currency:** A dropdown menu showing 'USD'.
- *Unit of Measure:** A dropdown menu with a lookup icon.
- Due Date:** A date input field with a calendar icon.
- Suggest New Vendor:** A blue hyperlink.
- Additional Information:** A large text area for additional details.
- Send to Vendor:** A checkbox.
- Show at Receipt:** A checkbox.
- Show at Voucher:** A checkbox.
- Add Item:** A yellow button.
- Cancel:** A yellow button.
- Add or Start New Type:** A yellow button.

- 4) The Special Request tab has several fields where information must be entered. The bulleted listed below lists these fields.

All the fields marked with an asterisk (*) must be completed.

- Item Description:** This is used to enter a detailed description of the item. Good descriptions begin with a noun and then have descriptive terms. Such as “Pants, insulated, blue, 34 waist, 32 length”.
- Price:** This is the estimated price for the item.
- Quantity:** This is the quantity needed.
- Unit of Measure:** This is used to select a Unit of Measure. Press the Lookup Button () to pull up a list of valid Unit of Measures. Select the appropriate Unit of Measure from the list.
- Category:** This is the National Institute of Government Purchasing (NIGP) code category. NIGP codes are the standard being used for Edison, replacing the old Tennessee Commodity Code (TCC) system. Press the Lookup Button () to pull up the NIGP search screen, shown below.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By

Categories [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-42 of 42 | [Last](#)

	Catalog	Category	Description	Find in Tree
1	PURCHASING ITEMS	240-96	Timers, Mechanical	
2	PURCHASING ITEMS	240-96	Timers, Mechanical	

- f) Type a description in the Description field and press the Find button. This will display a list of valid NIGP codes. Select the appropriate code from the list by clicking the link in the Category column. This will return you to the Special Item screen. The Category MUST be NUMERIC.

Catalog Favorites Templates Services Forms Web **Special Request**

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category: Due Date:

Vendor ID: American Paper And Twine [Suggest New Vendor](#)

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

- g) After entering in all the required fields (listed above), press the Add Item button (). When added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown on the next page.

Requisition Summary		
Description	Qty	UOM
Widget	6	EA
Total Lines: 1		
Total Amount (USD): 3,000.00		

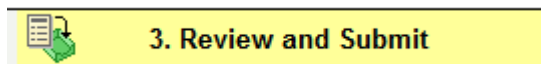
After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right.

Reprocuring of Expired Agency Contracts

- 1) If the request is a Reprocurement of a previously active contract that has expired, you can copy over the old Requisition used to request the contract, or copy the items from the old contract using the Catalog tab. Instructions for searching for items in the Catalog are located in the Contract Release section.
- 2) This means that the first time any Contract Request is entered, it must be done manually. After that, the items can be saved as a Template and reused when the contract must be reprocured again. Instructions for saving as a Template are located later in the document.
- 3) After the lines needed on the contract are copied over, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.






Step 3: Review and Submit





- 1) **Reviewing and Submitting Requisitions:** The final step in the Requisition process is to review and submit for approval. Regardless of the method and Purchase Type, all Requisitions will end here. The **Review and Submit** page contains a summary of the Requisition information. The first thing you must do on this page is enter your Document Type.

Create Requisition



 1. Define Requisition	 2. Add Items and Services	 3. Review and Submit
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Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit:  General Services


*Requester:  Robert J Hamblin

*Currency:

Requisition Name: Doc Type:  Priority: 

Line Defaults

Document Type

To select a Doc Type, click the Lookup Icon  located by the Doc Type drop-down field. Choose the appropriate doc type from the list. **It is very important to use the correct Doc Type for the Requisition.** Incorrect Doc Types will greatly delay processing. The table below lists the Document Types that correspond to the types of Purchases. For example, if you are ordering items that are not on contract and the total is under \$25,000, you would select the LPA Document Type.

The two most commonly used Doc Types in Agency Purchasing will be **DCR**, for Contract Release Orders and **LPA**, for Local Purchases with Agency Authority. **DCR** is for all Contract Release Orders. **LPA** is for all agency purchases that are not on contract and do not come to the CPO.

LPA	Local Purchase Authority – One-time purchases from \$0 - \$25000.00
DCR	DGS, Contract Release Order – Purchases made from an existing Statewide Contract or Agency Term Contract
DOT	DGS-One-time Purchase – One-time purchases over \$25000.01
DCO	Agency Term Contract – 1 year agency term contract.
DCM	Agency Term Multi-year – 2-5 year agency term contract.

DCM	DGS, Agcy Contract Request, MY
DCO	DGS, Agcy Contract Request, 1Y
DCR	DGS, Contract Release Order
DDA	DGS, Delegated Purchase Auth
DOT	DGS, One-Time Purchase
DPO	DGS, Emergency PO Request
ITP	IT Pro
LPA	Local Purchase Authority
SDA	SVC - DA-type Delegated Athrty
SDG	SVC - DG-type Delegated Athrty
SDL	SVC - DL-type Delegated Athrty
SDP	SVC - DP-type Delegated Athrty

- 2) After checking all the information in the top portion of the screen, ensure that the Lines entered are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen. The Requisition Lines will look like the picture below.


Requisition Lines						
Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Widget		6.0000	Each	500.000	3,000.0
<input type="checkbox"/> Select All / Deselect All <input type="button" value="Modify Line / Shipping / Accounting"/> <input type="button" value="Delete"/>						Total Amount: 3,000.00 USD
<input type="button" value="Add to favorites"/>						

Altering Quantity:



The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

A small rectangular input field with a blue header labeled 'Quantity' and a white body containing the text '6.0000'.


Deleting Lines:

If a line needs to be deleted, click the check box next to the line, then press the Delete button ( Delete). This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**

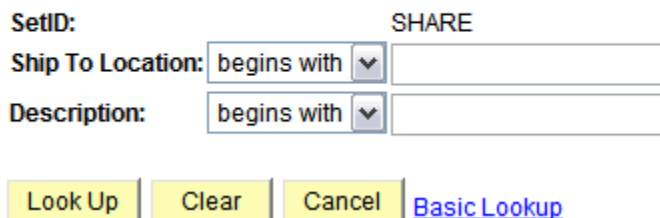
Shipping Addresses:

To modify a Shipping Address, you must expand the table by using the Expand Section () button. This will show the *Ship-To field . It defaults as PMFMSHIP TO, which must be changed.


A screenshot of a software interface for a shipping line. At the top, it shows '1 FLAME RESISTANT PANTS, DEPT', 'Lion Apparel', '1.0000 Each', and '82.000'. Below this are checkboxes for 'Consolidate with other Reqs' (unchecked) and 'Override Suggested Vendor' (checked). The main section is titled 'Shipping Line: 1' and includes fields for 'Due Date', 'Quantity: 1.0000', 'Status: Active', 'Ship To: PMFMSHIP TO' (with a lookup icon), 'Attention: TN2_PU_EPRO_AGENCY_REQUESTOR', and a 'Modify Shipping Address' link.


- Click the Lookup Icon () next to the Ship-To field. This brings you to the Look up Ship to page, as shown below.


Look Up Ship To

A screenshot of the 'Look Up Ship To' form. It has a 'SetID:' field with the value 'SHARE'. Below it are two rows: 'Ship To Location:' and 'Description:', each with a 'begins with' dropdown menu and an adjacent text input field. At the bottom are three buttons: 'Look Up', 'Clear', and 'Cancel', followed by a blue link labeled 'Basic Lookup'.

- Use the Look up Ship to screen to find your specific Ship To location by changing the drop-down box next to the “Description” field from “begins with” to “contains”. Then press the Look Up button.


Description: 





- This will pull up a list of agency locations.

Ship To Location	Description
0000013981	PURCHASING DIVISION


- Click the location that seems correct to go back to the main page. Use the Modify Shipping Address ( [Modify Shipping Address](#)) link, located to the right of the Ship-To field to check the pulled address.
- This brings up the address information tied to that Ship-To location.

Shipping Address

Line	Description	Quantity	Price
1	BRAKE ROTOR FRONT MOTORCRAF	1.0000 Each	0.00000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	PURCHASING	1.0000		0.00 USD

▼ Address


Country:  United States Prefix:

Address 1: Phone:

Address 2: Ext:

- Verify that the information is correct. If it is not, choose a different Ship-To location.

Adding Notes and Comments:

Any special delivery instructions for the item have to be provided. To Add Notes or Comments, click the Comments button () at the far right of the screen. If it is not visible, use the scrollbar at the bottom to scroll to the right. This will open up a new window. Type any general descriptive information into the text box (such as “Call for delivery”).

❖ **Repeat as necessary for all lines**

Chartfields:

Chartfields contain the accounting information. It is the responsibility of the agency to ensure the information in the Chartfield is correct. To view Chartfield information, you must expand the table by using the Expand Section (▾) button. Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.
- Location CF: Found on the Chartfields2 tab.

Information on each of those fields can be found by using the Lookup button located next to each field. The particular listing (for example, what Fund to use) can be obtained from the specific Agency's Fiscal Office.

The screenshot shows a requisition form for 'FLAME RESISTANT PANTS, DEPT'. The item is 'Lion Apparel' with a quantity of '1.0000' and a unit of 'Each', priced at '82.000'. The form includes checkboxes for 'Consolidate with other Reqs' and 'Override Suggested Vendor'. Shipping details include 'Shipping Line: 1', 'Due Date', 'Quantity: 1.0000', 'Status: Active', 'Ship To: PMFMSHIP TO', and 'Attention: TN2_PU_EPRO_AGENCY_REQUESTOR'. There are also fields for 'Distribute by' and 'SpeedChart'. The 'Accounting Lines' section is expanded, showing a table with columns: Line, Status, Dist Type, Location, Quantity, Percent, Amount, GL Unit, and Account. The table contains one line item with the following data:

Line	Status	Dist Type	Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		000000	1.0000	100.0000	82.00	33600	70900

Justifications:

Justifications will be typed in the Justification/Comments section as required by CPO policies and procedures. This field is for internal use only. Do **NOT** check the Send to Vendor, Show at Receipt or Show at Voucher checkboxes.

The screenshot shows the 'Justification/Comments' section with a large text area for input. Below the text area are three checkboxes: 'Send to Vendor', 'Show at Receipt', and 'Show at Voucher', all of which are currently unchecked.

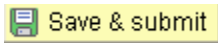
- 3)** The requisition can be saved as a Template by checking the “Save as Template” box. Templates can be selected in Step 2 to automatically fill in the item Lines when creating new Requisitions. It is a good idea to save all Contract Requests as a Template, in the event that they have to be reprocured in the future.

☐ **Save as Template**

- 4) To Budget Check the Requisition, press the “Check Budget” button. This must be completed in order to pre-encumber funds.



- 5) To Save and Submit the Requisition for further processing, press the “Save and Submit” button.



- 6) Once the Requisition has been saved, it will go to a screen showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later.

Confirmation

Requested For:	TN2_PU_EPRO_AGENCY_REQUESTOR	Number of Lines:	1
Requisition Name:	greg	Total Amount:	1.00 USD
Requisition ID:	0000000287		
Business Unit:	33600		
Priority:	Medium		
Budget Status:	Not Checked		

Requisition Approval

▼ greg:Pending [Start New Path](#)

Requisition Approval

Pending

[Multiple Approvers](#)

Req - 1st Agency Approver

+

Submit

Edit Requisition



Apply Approval Changes


Check Budget

Approvals

- a) To view more information on the approvers, click on the “Multiple Approvers” ([Multiple Approvers](#)) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.


Approver #1	
Name:	TN_P1_BUB_CT2_SV_DT2
EmplID:	
Department:	
Supervisor ID:	
Telephone:	
Reports To Position Number:	
Email ID:	

b) To add additional approvers, click the Insert Approver button. () This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button () next to the User ID field, then selecting the User ID from the list.

- i.** Use the Radio Buttons () below the User ID Field to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.

Insert additional approver or reviewer



- ii.** After selecting the Approver's User ID and their function (Approver or Reviewer), click the Insert button.  This returns you to the main approval screen.


7) Requisitions must pass all approvals before being sent on to either the Agency Buyer or CPO personnel.

★ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item's NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all commodity approvals.

★ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

8) To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.



Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:** ).

The Approval Status and Budget Check status of the Requisition are listed in this table.

Requisitions							
To view the lifespan and line items for a requisition, click the Expand triangle icon: ▸							
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.							
Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▸ 0000000145	DGS TJ)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action... ▾ Go
▸ 0000000144	DGS TJ)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action... ▾ Go
▸ 0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action... ▾ Go

- 9) Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.

Review/Edit Approvers

Requisition Approval

greg:Approved

Requisition Approval

Approved

✓ TN P1 BUB CT1 SV DT1
Req - 1st Agency Approver
11/25/2008 - 2:50 PM

When the Requisition is approved, you are ready to proceed. Depending on the Doc Type, the Requisition will go to one of three places.

- Local Purchases will go to Agency Buyers to be bid out and Sourced, which the next section covers.
- Contract Release Orders and orders under \$25,000 will be turned into Purchase Orders, which the final section covers.

Non-Contract Purchases over \$25,000 and Requests for Agency Contracts will appear on a daily report run by the CPO and will be assigned to appropriate personnel.